Getting started made easy!
A short introduction to

TimeTac
Shift Planning

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Shift Planning Overview

Shift Planning

TimeTac allows you to precisely plan your personnel and employee allocation for future periods of time. You can create shift plans for specific days, weeks or months. These shift plans are visible to your employees in their personal calendars as planned data entries. You can create your various operational locations to match your needs. The application allows you to specify the required number of employees for each shift and assign the specific personnel. To open the shift planner, click on the Planning menu option **1**, followed by Shift Planner **2**.

Overview

The Shift Planner displays all your created shift plans in one display. These are organised into the specific locations and associated tasks of each shift **3**.

The upper heading displays the weekday and date for the currently displayed columns **4**. The number of assigned and required personnel for each shift are displayed as a circular symbol **5**. Each shift also displays the relevant duration within **6**. Hovering your mouse on the relevant shift will display the currently assigned personnel for that shift **7**.
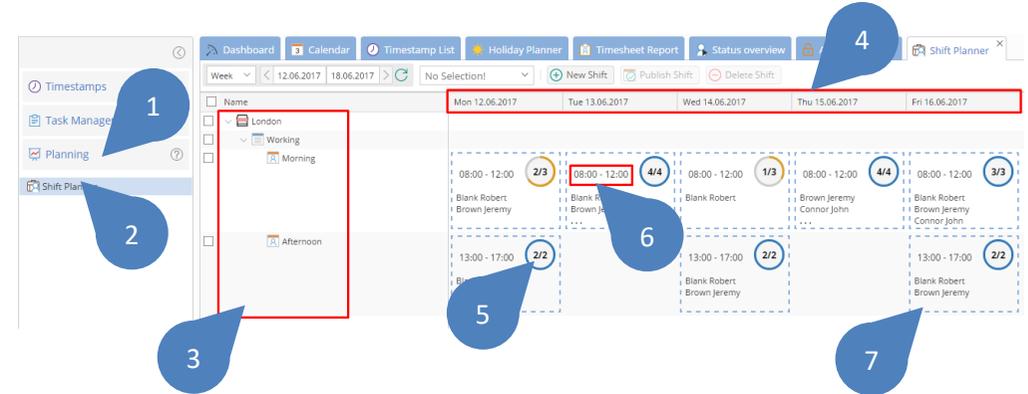
Note: Before creating a shift plan, ensure your required location has been created within Settings, then Locations.

User Management

User Management

In order to plan your personnel, or to allow your employees to be a planner for a particular location, they first need to have the appropriate permissions. Navigate to Settings ①, then User Management ②. Select the desired user from the display ③; the details panel on the right will open automatically ④.

Note: Managers with Full Employee Access will always have access to the Shift Planner

User Data

In the User Data section of the details panel ⑤, check the checkbox for Shift Planner ⑥ to grant this user the required permission. Click on Save to complete these changes ⑦.
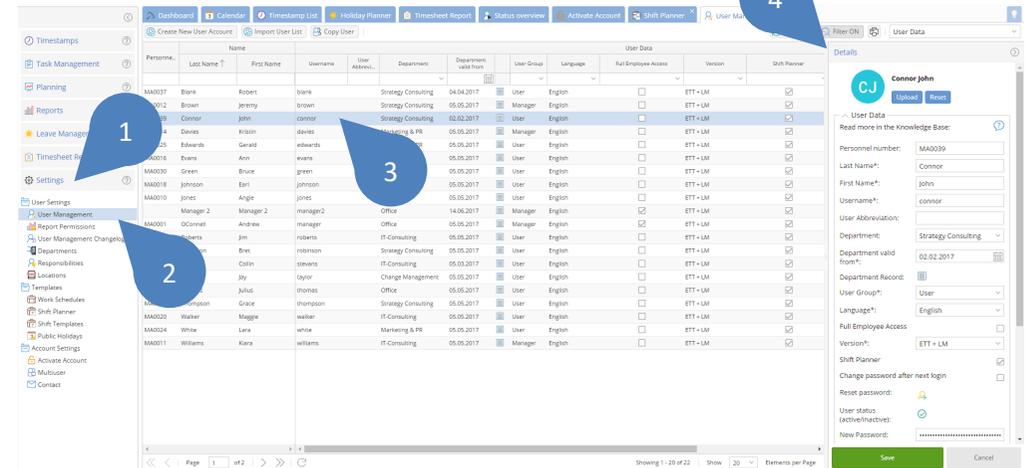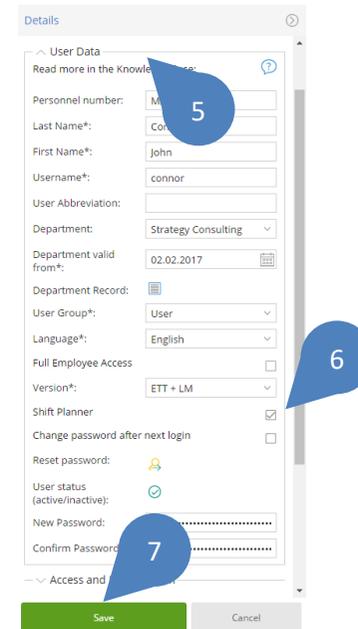

Figure 1: User Management

Figure 2: User Data

Shift Templates

Shift Templates

Shift templates allow you to simplify the planning of future shifts by storing commonly used shift plans in the form of a template. These templates can be reused for different time frames in the future.

Create a Shift Template

To create a shift template, navigate to Settings, then Shift Templates ①. Within the leftmost panel, click on Add ②. You can double click in the name line to change the name for this shift template ③. The rightmost panel allows you to define the values for each working day of the shift plan. Specify the start and end times in the respective columns ④, as well as the number of required employees for this shift ⑤. You can also assign employees to a shift within this shift template.

Edit/Copy a Shift Template

Click on Delete to remove a shift template ⑥. You can select an already existing shift template, then click Copy to create a similar shift template ⑦.

Note: When using a shift template, ad hoc alterations can also be made to reflect any changes in personnel requirements.
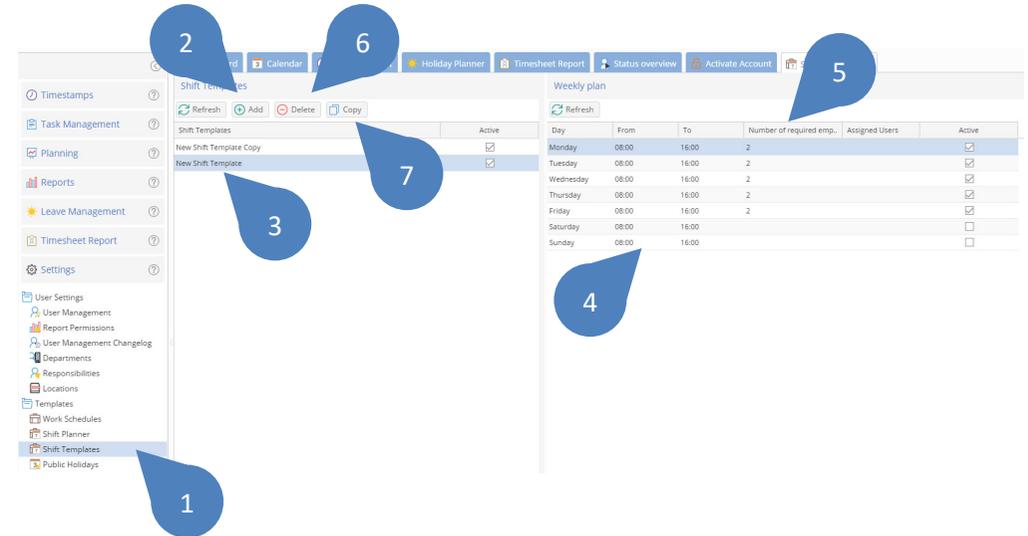
Locations

Create a New Location

To create a shift plan, it is necessary to create the location to which this shift applies. Navigate to "Settings", then "Locations" to do so ①. Click on "Add Location" ② and provide the relevant name by double clicking within the "Name" field ③.

Planner

Planners are able to create shift plans for a particular location, as well as assign the required employees to each shift.

To assign a user as a planner for a location, open the dropdown for the specified location, found under the "Planner" column ④. Select the desired planner or planners via the relevant checkboxes ⑤.

Note: Only users for whom the Shift Planner is active are able to be assigned to a location.

Assign Employees

To assign employees, click within the relevant dropdown menu under the "Assigned Users" column ⑥. Select the desired employee or employees via the relevant checkboxes ⑦. You can also assign a Public Holiday Template to a location to see applicable holidays when creating shift plans ⑧.
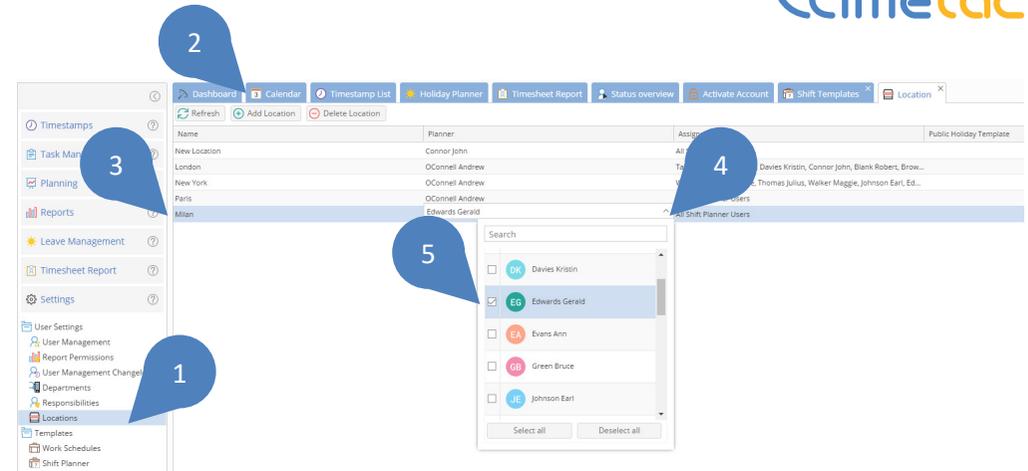

Figure 1: Locations

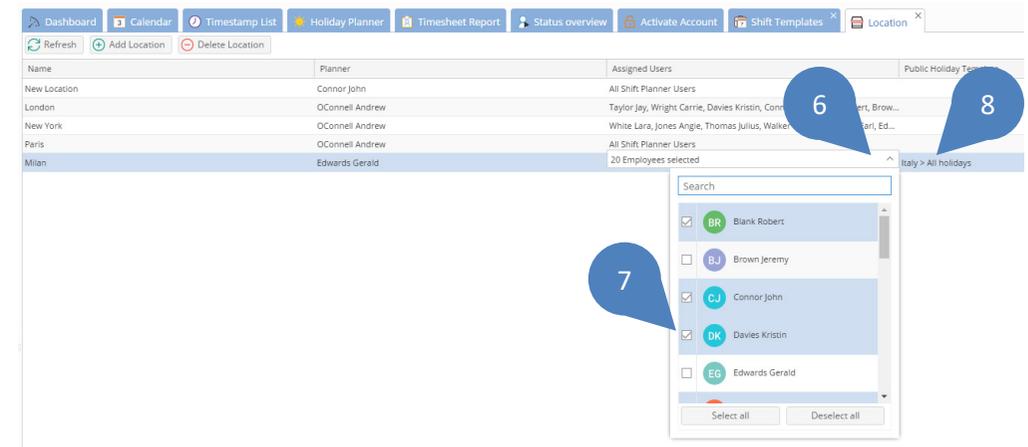Figure 2: Assign Employees

Create a Shift

Create a Shift Plan

To create a new shift plan, navigate to "Settings", then "Shift Planner" ① . Click on "New Shift" ② .

In the displayed popup window, select the location to which this shift plan should be assigned ③ . You can now select a shift template should you wish to ④ . Provide a name for your shift plan ⑤ .

The task for this shift can be selected within the "Sector" dropdown.

The applicable working days can be selected via the checkboxes. For each day, specify the start and end time of each shift via the dropdown selections ⑥ . Specify the required number of required employees for the shift ⑦ , and if desired, you can already assign employees to a particular shift ⑧ .

You can now define the time frame for which this shift plan should apply, using the calendar pickers for the start and end dates ⑨ .

Optional fields include an abbreviation and a comments field for each shift.
Click on "Apply" to complete the addition of this shift plan.

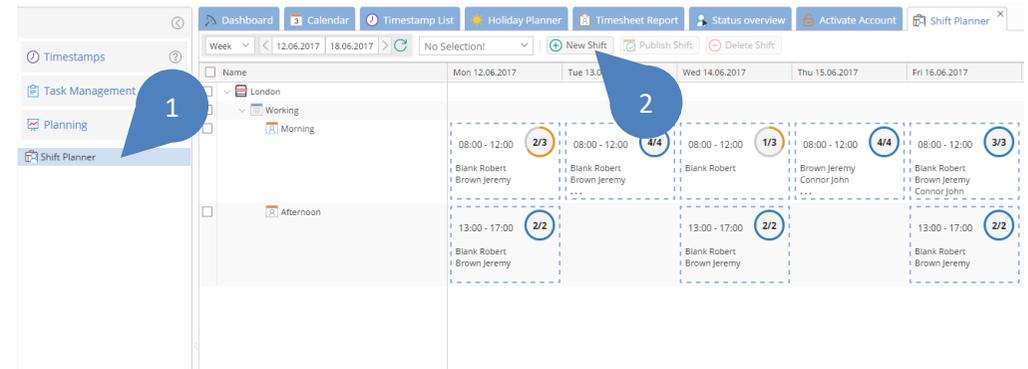Already created shifts can be deleted by clicking on "Delete Shift".
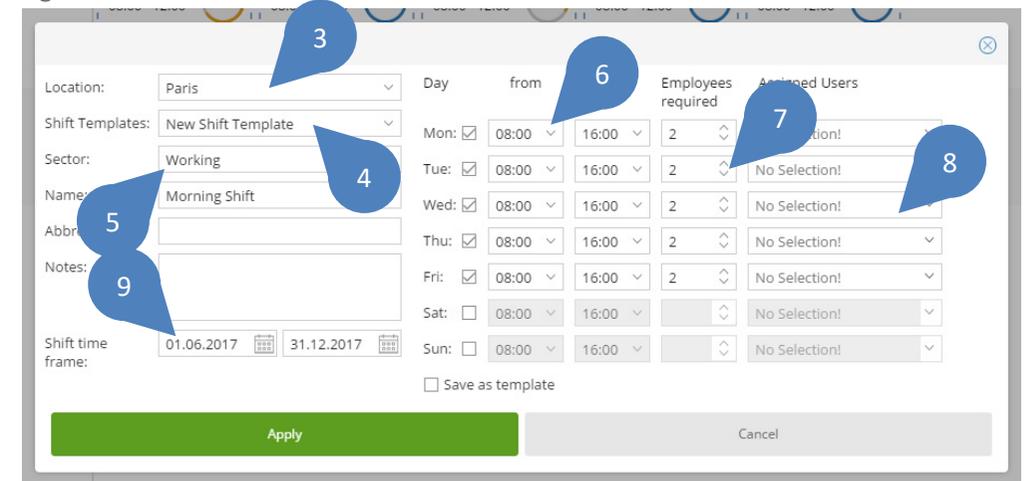

Figure 1: Shift Planner

Figure 2: Create a Shift

Publish/Unpublish a Shift

Publish a Shift Plan

After you have a created a shift, you need to publish it. Select the desired shift via the relevant checkbox ❶, then click "Publish Shift" ❷. The next window allows you to check and confirm the time frame for which the shift plan should be published ❸. Once finished, click on "Apply" ❹.

The assigned users will now see a planned data entry for this shift in their Calendar.

Context Menu

Another method of publishing a shift is to right-click on the selected shift, opening a context menu, where you can select "Publish Shift Day" to publish the shift for this single day ❺.
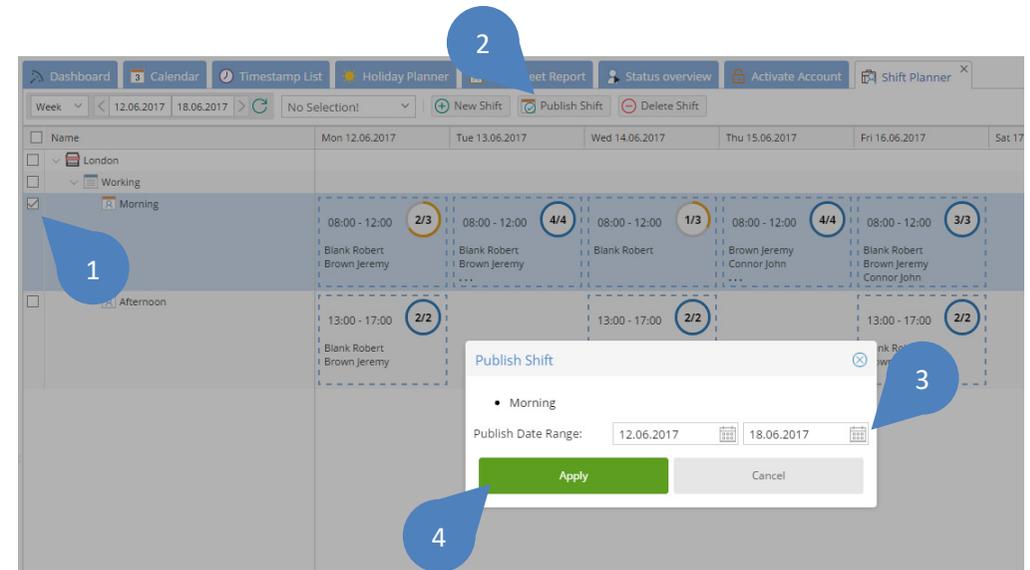
Figure 1: Publish a Shift
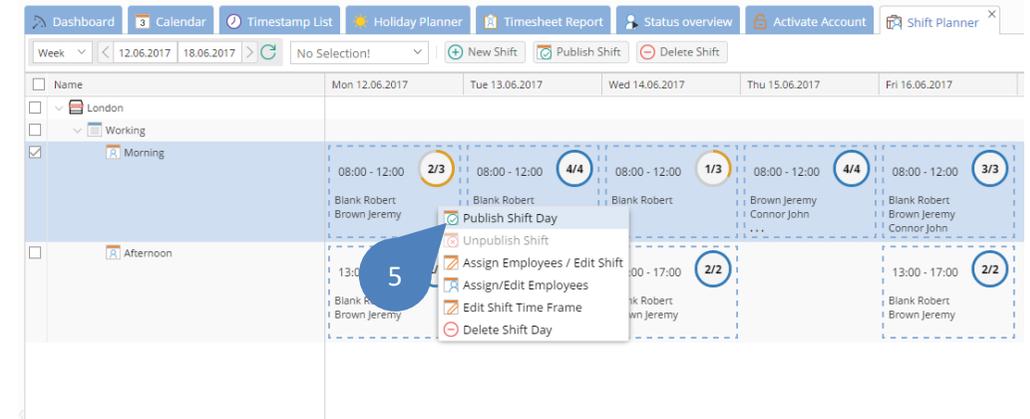
Figure 2: Publish Shift Day

Edit a Shift

Context Menu

Already created shift plans can be edited via the context menu. Right-click on the desired shift and click on "Edit Shift" ①. To assign employees, select "Assign/Edit Employees" ②. If you wish to alter the time frame of the shift, then you can do so by selecting "Edit Shift Time Frame" ③.

Edit Shift

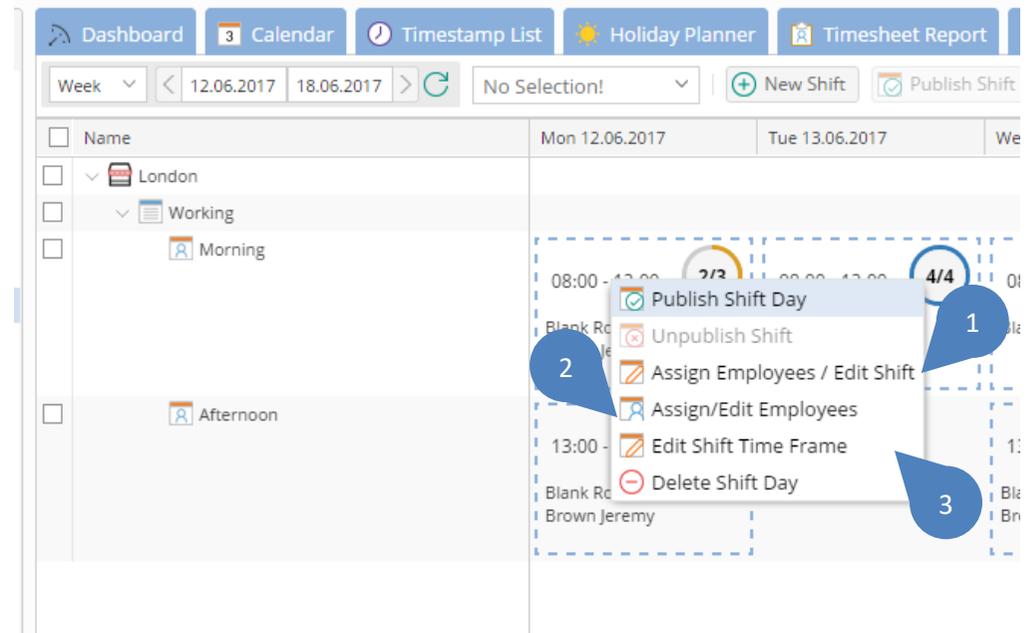This allows you to edit the duration of the shift for any given time period.

Assign Employees

Here you can assign the necessary employees to a particular shift.

Edit Shift Time Frame

This option allows you to edit the applicable time frame which this shift plan covers, extending or reducing the number of days it applies for.

Delete a Shift

Delete a Shift

You can delete already created shift plans by first selecting them, then clicking "Delete Shift" ①.

Note: Already published shifts cannot be deleted.

Context Menu

The context menu offers another method of deleting shifts. Right-click on the relevant shift and select "Delete Shift Day" from the context menu ②. This method only allows you to delete individual shifts at a time.
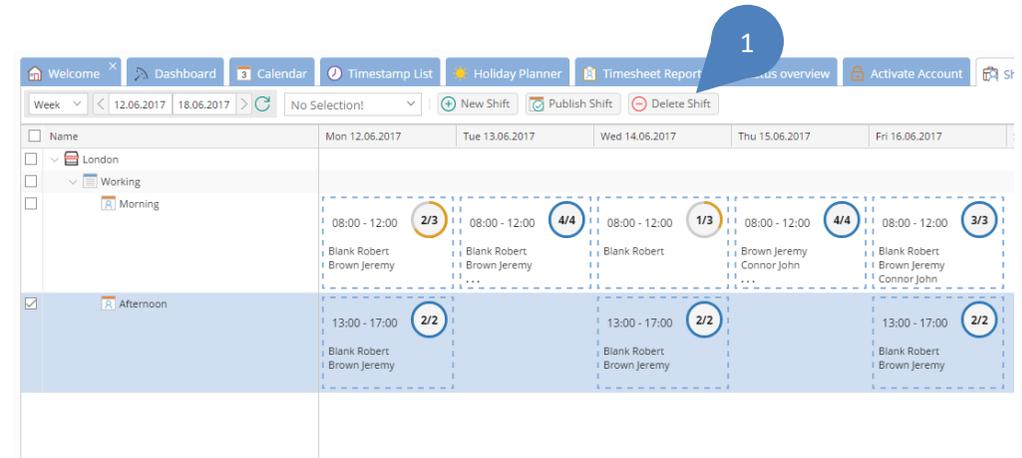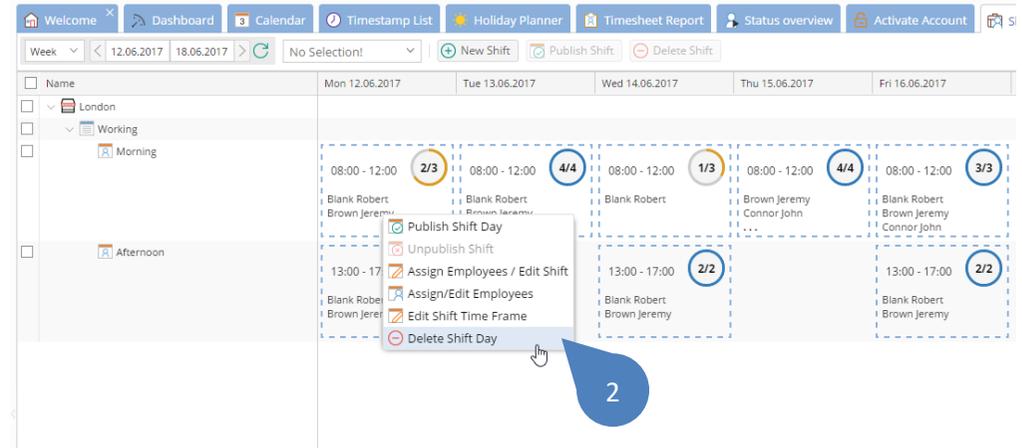

Figure 1: Delete a Shift

Figure 2: Delete a Shift Day

Calendar View

Published Shifts

Already published shifts are portrayed in the Shift Planner in a solid, blue colour ①.

Calendar View

Employees will see shifts are planned data entries in their individual calendars ②.

Converting to Timestamps

After the working day has been completed, the planned data entry for a shift can be converted into a timestamp. Right-click on the planned data entry within the Calendar and select "Create Timestamp" ③.

Planned data entries and timestamps are displayed alongside each other, allowing you to see whether the working arrangements were adhered to.
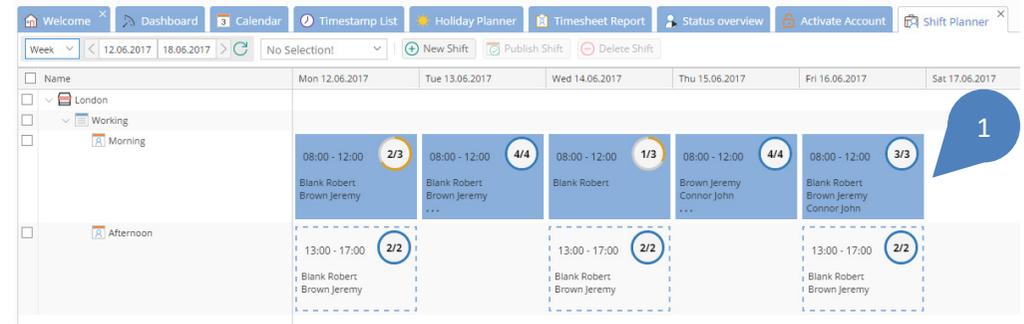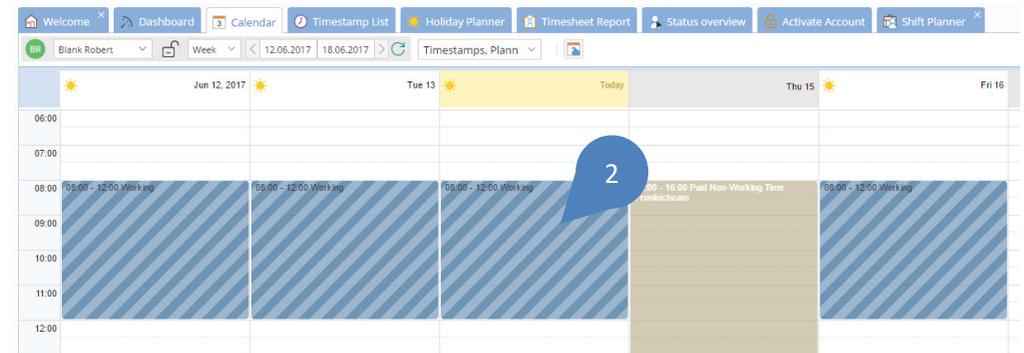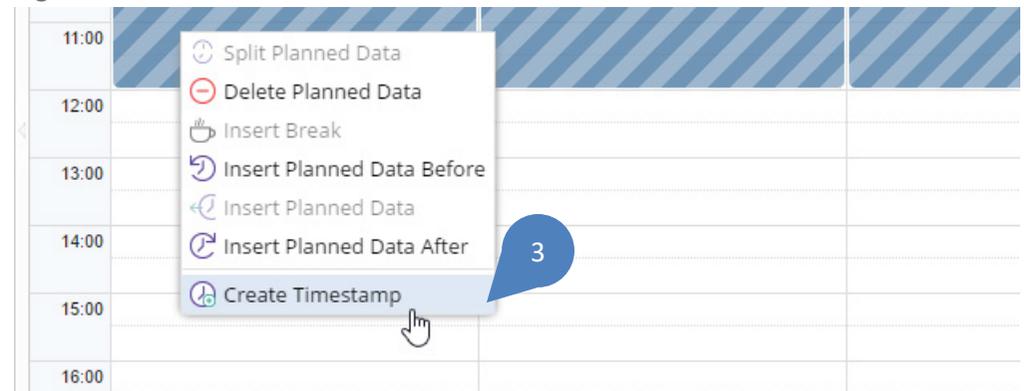

Figure 1: Published Shifts

Figure 2: Calendar View

Figure 3: Create Timestamp